

Message Text

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PASS DEPT OF COMMERCE FOR DAS R. SHEPHERD AND
D. PETERSON

E.O. 11652: N/A
TAGS: EGEN, OECD
SUBJECT: INDUSTRY COMMITTEE MEETING, JUNE 28-30:
DRAFT WORK PROGRAM SUBMITTED BY AD HOC WORKING PARTY
ON PULP AND PAPER, JUNE 19-20

FOLLOWING IS TEXT OF PROPOSAL AGREED TO AT JUNE 19-20
MEETING OF AD HOC WORKING PARTY ON PULP AND PAPER:

I. STUDY ON STRUCTURAL ADAPTATION IN THE PULP AND
PAPER INDUSTRY

OBJECTIVE

1. THE OBJECTIVE OF THE AD HOC WORKING PARTY'S STUDY
ON "STRUCTURAL ADAPTATION" SHOULD BE TO IDENTIFY,
ANALYSE AND, WHEREVER POSSIBLE, QUANTIFY THE MAJOR FAC-
TORS THAT HAVE A DETERMINING IMPACT ON THE DEVELOP-
MENT OF THE PULP AND PAPER INDUSTRY IN MEMBER COUNTRIES.

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THESE FACTORS WILL BE CONSIDERED IN RELATION TO PRO-
JECTED DEMAND/SUPPLY SITUATIONS IN THE MEDIUM TERM
(I.E. UP TO 1985). THE STUDY IS AIMED AT MAKING
GOVERNMENTS AWARE OF ONGOING AND FUTURE PROBLEMS THAT
THIS SECTOR OF INDUSTRY WILL HAVE TO CONTEND WITH AND
AT PROVIDING SOME INFORMATION THAT POLICY MAKERS CAN
UTILIZE.

BROAD OUTLINE OF THE METHODOLOGY

2. AS IT IS VERY DIFFICULT AT THIS TIME TO FULLY IDENTIFY ALL THE FACTORS WHICH FIRSTLY HAVE A DETERMINING EFFECT ON THE INDUSTRY AND SECONDLY THOSE ON WHICH GOVERNMENT POLICIES COULD HAVE A SIGNIFICANT IMPACT, THE STUDY THEREFORE WILL BE DIVIDED IN TWO STAGES. PHASE I WILL PROVIDE AN OVERVIEW OF THE EXISTING INDUSTRY'S STRUCTURE AS WELL AS GOVERNMENT POLICY MEASURES RELATIVE TO THE INDUSTRY. IT WILL ENCOMPASS AN ASSESSMENT OF PROJECTED SUPPLY AND DEMAND AND AN ATTEMPT TO ESTABLISH A PRIORITY ON THE MAJOR FACTORS AFFECTING THE INDUSTRY. IT SHOULD BE EMPHASIZED THAT THE WORKING PARTY INTENDS TO UTILIZE TO THE MAXIMUM EXTENT POSSIBLE ALL EXISTING SOURCES OF INFORMATION AND DOES NOT INTEND TO REPEAT WORK WHICH HAS BEEN ALREADY COMPLETED BY NATIONAL OR INTERNATIONAL BODIES. PHASE II WILL BE DESIGNED TO PROVIDE AN ANALYSIS AND ASSESSMENT OF THOSE FACTORS SELECTED IN PHASE I AS HAVING MAJOR IMPACT ON THE INDUSTRY.

PHASE I

3. IT WILL CONSIST OF EACH MEMBER COUNTRY PROVIDING:
(A) A DETAILED DESCRIPTION OF THE EXISTING STRUCTURE
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OF THEIR INDUSTRY (NUMBER OF MILLS, PRODUCTIONS, MILL SIZE, EMPLOYMENT, ETC.).

(B) AN ASSESSMENT OF THE SUPPLY/DEMAND SITUATION UP TO 1985 BY USING EXISTING SOURCES TO THE MAXIMUM EXTENT POSSIBLE AND MODIFYING THOSE DATA WHERE NECESSARY.
(FOOTNOTE - THE GERMAN DELEGATION INFORMED THE WORKING PARTY THAT THE GERMAN GOVT DOES NOT UNDERTAKE PROJECTION ON INDIVIDUAL INDUSTRIAL BRANCHES AND IS THEREFORE NOT ABLE TO PROVIDE OFFICIAL FORECAST DATA.)

(C) A REVIEW OF GOVERNMENT MEASURES AFFECTING THE INDUSTRY.

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(D) A LIST OF THE MAJOR FACTORS THAT HAVE A DETERMIN-
ING IMPACT ON THE DEVELOPMENT OF THE INDUSTRY AND
ESTABLISHING A PRIORITY AMONG THOSE FACTORS. ITEM SUCH
AS THE FOLLOWING WOULD BE GIVEN CONSIDERATION:
TECHNOLOGY, RAW MATERIAL, ENERGY, ENVIRONMENT,
TRANSPORTATION, INTEGRATION AND RATIONALISATION, AND
THEIR RELATIONSHIPS WITH INVESTMENT NECESSARY FOR
EXISTING PRODUCTION AS WELL AS FOR NEW CAPACITY. EACH
MEMBER COUNTRY WILL GIVE THESE FACTORS CONSIDERATION
IN THE MANNER IN WHICH THEY DETERMINE APPROPRIATE TO
THEIR OWN INDUSTRY SITUATION.

4. INTO WHAT DEPTH AND DETAIL IT WILL BE POSSIBLE TO
GO INTO THE BREAKDOWN OF SUPPLY AND DEMAND PROJECTIONS
IS YET TO BE DETERMINED BY THE WORKING PARTY. THIS
WILL NECESSITATE A PRIOR CONSULTATION WITH MEMBER
COUNTRIES TO DETERMINE WHAT DATA THEY CAN PROVIDE.

5. TO DEVISE A QUESTIONNAIRE WHICH WILL PROVIDE
MEMBER COUNTRIES' ANSWERED TO "A TO D" IT WILL BE
NECESSARY TO HAVE THE SERVICE OF A QUALIFIED CONSULTANT.
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IN ADDITION, THE CONSULTANT WILL BE NEEDED FOR THE
FORMULATION OF THE SUMMARY OF PHASE I (SEE BELOW) AND
IN SUBSEQUENT WORK TO BE CONDUCTED IN PHASE II.

AN INTERIM REPORT SUMMARISING THE FINDINGS OF
PHASE I WILL BE PRESENTED TO THE WORKING PARTY FOR

DISCUSSION AND DECISION ON THE APPROACH TO BE TAKEN IN
PHASE II.

PHASE II WILL CONSIST OF:

(A) THE SELECTION OF THE MAJOR FACTOR, OR FACTORS,
AFFECTING THE INDUSTRY;

(B) ACQUIRING ADDITIONAL INFORMATION, IF NECESSARY;

(C) ANALYSING AND ASSESSING THE SELECTED
FACTOR(S) AS WELL AS RELEVANT GOVERNMENT POLICY
MEASURES;

(D) DRAFTING AND EDITING THE FINAL REPORT FOR SUBMIS-
SION TO THE INDUSTRY COMMITTEE.

TIMETABLE

THE QUESTIONNAIRE FOR PHASE I MUST BE DRAFTED BY
THE CONSULTANT AND A SMALL STEERING PARTY TO ENABLE
PRESENTATION TO AND DISCUSSION IN THE AD HOC WORKING
PARTY AT ITS NEXT MEETING IN THE EARLY FALL OF 1978.

THE RESULTS OF PHASE I SHOULD BE DISCUSSED IN THE
PLENARY MEETING OF THE AD HOC WORKING PARTY NEAR THE
END OF MARCH 1979.

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PHASE II AND THE EDITING OF THE FINAL REPORT SHOULD
BE COMPLETED BY THE EARLY SPRING OF 1980.

II. AWARENESS OF EMERGING PROBLEMS

OBJECTIVE

THE PURPOSE OF THIS EXERCISE IS TO PROVIDE THE
INDUSTRY COMMITTEE AND MEMBER GOVERNMENTS WITH A SET
OF RELEVANT INFORMATION AND TO DRAW THEIR ATTENTION
TO EMERGING PROBLEMS WHICH COULD AFFECT THE INDUSTRY.

METHODOLOGY

EACH DELEGATION WILL PRODUCE A BRIEF, TWICE-YEARLY
SUBMISSION ON SIGNIFICANT FACTS AFFECTING THE INDUSTRY
DURING THE PRECEDING SIX MONTHS. THIS SUBMISSION WOULD
TAKE THE FORM OF A QUALITATIVE AND SEMI-QUANTITATIVE
ASSESSMENT (UTILISATION OF PRODUCTION CAPACITY, RAW

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MATERIAL AND PRODUCT INVENTORIES, AVAILABILITY AND COST OF RAW MATERIALS AND MANPOWER, ACTIVITY IN AREAS FELT PERTINENT TO DEMAND FOR PULP AND PAPER, INVESTMENT CLIMATE, ETC.). THESE ASSESSMENTS WOULD BE ACCOMPANIED BY SOME INDICATION OF THEIR EXPECTED TRENDS IN THE IMMEDIATE FUTURE. EACH SUBMISSION WOULD CONSIST OF NOT MORE THAN ONE PAGE OF ANALYSIS FOLLOWING A SUGGESTED FORMAT WITH ANY SUPPORTING STATISTICAL TABLES ATTACHED AS AN ANNEX. THE SECRETARIAT WOULD COLLATE THE SUBMISSIONS AND ISSUE THEM TO THE MEMBERS OF THE AD HOC WORKING PARTY PRIOR TO THEIR MEETING.

THE WORKING PARTY WILL EVALUATE THE ASSEMBLED INFORMATION AND PROVIDE, ANNUALLY OR MORE FREQUENTLY IF NECESSARY, THE INDUSTRY COMMITTEE WITH A BRIEF REPORT ON THE SITUATION OF THE INDUSTRY AND ON MAJOR DEVELOPMENTS WHICH COULD AFFECT IT.

THIS STUDY WOULD NOT DUPLICATE THE WORK OF WORKING PARTY NO. 9 ON INDUSTRIAL STATISTICS BUT COMPLEMENT ITS ACTIVITY ON SHORT TERM QUALITATIVE INDICATORS. FURTHERMORE IT IS EMPHASIZED THAT THIS

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WORK WILL COMPLEMENT THE STUDY ON STRUCTURAL ADAPTATIONS IN THE PULP AND PAPER INDUSTRY.

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